

**INVESTMENT FORUM PROGRAM FOR WEDNESDAY, OCTOBER 19, 2016,  
11:50AM,  
Lord of Life Lutheran Church, 5114 Twinbrook Road, Fairfax**

The Fall Term runs through November 9, at 11:50AM, at Lord of Life. The Forum will meet as a “club” on November 16 and 30, and December 7 and 14, at **10:30AM**. No registration is needed for club meetings.

Tom Crooker will be the Moderator this week.

***Perspective.*** Brief discussion of a potpourri of recent topics relating to individual investing.

***Member Presentation.*** Paul Howard will share investment experiences gained and lessons learned as he and his wife have navigated retirement without the benefit of a defined-benefit pension.

***Moderator Discussion.*** Tom will follow on on the topic of ETF investing introduced last week with some preliminary thoughts on how to utilize the compendium of information available to readers of the *Morningstar ETF Investor* newsletter.

***Wrap-Up.*** Other topics as time permits and members express interest.

***Future Topics.*** On November 30, Terry Trenchard will discuss moving averages and sell signals, and/or other topics as we decide between now and then. You are invited to suggest topics for Terry to discuss, to me. Terry is a Chartered Market Technician with Capitol Securities Management, Inc, Reston, VA, and he writes a weekly commentary on markets. Terry has previously spoken to the Forum on market technicals.

## ***Buys and Sells***

### Buys - week of October 12

Verizon (VZ)

Pimco Dynamic Credit and Mortgage CEF (PCI) 7.1% discount, 9.75% yield

CA, Inc (CA) - software. MC: \$13.4B

Ford (F) - dividend play

General Electric (GE) - dividend play

CVS (CVS) - low price

### Buys - week of October 19

Monsanto (MON)

Verizon (VZ)

### Sells - week of October 19

McDonalds (MCD)

### Thinking About

Adient (ADNT) - Johnson Controls (JCI) spin-off as of 10/31/2016

Disney (DIS)

Wells Fargo Intermediate Tax/AMT Free Bond Fund (WFTAX)

Wells Fargo Discovery Fund (WFDAX)

Al Smuzynski

Investment Forum Moderator

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